



Getting past the “gatekeeper” to get to the “decision maker”

March 03, 2020 - Long Island

This column is offered to help educate agents new to commercial and investment brokerage and serve as a review of basics for existing practitioners.

To be continually successful in commercial real estate you need to prospect every day, this includes cold calling. The challenge is to get the “decision maker” on the phone, which often means getting past their secretary. A simple solution that sometimes works is to call before or after regular business hours. At 8 a.m. or 5:30 p.m. the “boss” may pick up the phone themselves—then what do you say? (more on that next month)

There are many schools of thought on how to get past the “gatekeeper” to the decision maker. Prepare for your call, expect to speak to the “gatekeeper” first. Be nice, polite, and cordial. Treat the person with respect, not like an “employee.” It is not uncommon to have to make three to five calls before you eventually get through to the property owner or landlord. Use each opportunity to gather information. The job of the receptionist or secretary is to determine who you are, what company you are with and what this call is regarding.

Before you call, target the firm you are calling on the internet, who are the officers, what does the company do, then determine the decision maker you want to talk to.

Typically, the phone is answered by the receptionist or secretary by saying something like, “This is Kathy, at Atlas Industries, how may I direct your call?” Make immediate note of the person’s name. One suggestion to “break the ice” with the gatekeeper is by saying, “Hi Kathy, my name is Ed. How is your day going so far?” “Fine.” Then answer some of expected questions before they are asked. “Wonderful, this is Ed from Smith Commercial. Is Tom available?”

This is the casual approach only using my first name and the “targets” first name. You could be more formal: “Wonderful, this is Ed Smith from Smith Commercial. May I please speak to Tom Jones.” Either approach may still lead to their asking, “What is this in reference to?”

There are several ways to answer this, but your reply must be purposeful giving the secretary a feeling that their “boss” will want to talk to you. Just using commercial jargon and terms may be convincing, “I need to talk to Tom about his Main St. office buildings occupancy problems and how to increase his NOI.” Getting more specific is even better. “There is a property that just came on the

market near Toms, that could give him an idea of today's market value of his building, that is what I need to talk to him about." Or you could be referring to a property recently sold, or investment property; everyone wants news about market conditions and values.

Or you could combine the comments from the last two paragraphs answering all three questions of who you are, what company and why are you calling. "Hi Kathy, this is Ed Smith from Smith Commercial. Please connect me with Tom Jones— I have new market information that may affect the value of his Main St. building."

Sometimes gatekeeper will put you off or contact their boss who is involved in something else and does not want to be disturbed at this time. "Mr. Jones is not available." Now gather information. "When would be a good time to call?" "Mr. Jones is usually available after two o'clock."

When you call back later you can say, "Hi Kathy, it's Ed Smith again, is Tom available now." It may take several calls to get through, but each time you call the chances increase on connecting to the decision maker. Persistence pays.

Another method of getting past the "gatekeeper" is to send a motivational or business book to the building owner with a simple handwritten note, "Thought you might enjoy this" signed by you. Then, four or five days later, call and ask to speak to Joan (the owner). "This is Ed from Smith Commercial, I'm calling to see how Joan liked the book I sent her?" The person you are speaking to probably opened the mail and knows about the book.

As said, there are many approaches to get past the gatekeeper, do some internet research for more ideas.

Next month: What to say when you get the "decision maker" on the phone.

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